

CMS Net

Pending Transfer

Pending Transfers Table of Contents

<i>Pending Transfers</i>	<i>i</i>
<i>Table of Contents</i>	<i>i</i>
<i>Preface</i>	<i>1</i>
Legend	1
<i>Pending Transfer</i>	<i>1</i>
Overview	1
Important Note	1
Business Rules of the transfer process	1
Steps to Access Pending Transfer (CMSPT-10)	1
Pending Transfer Screen (CMSPT-10)	1
Pending Transfer Screen Data Entry Fields	1
Action Menu	3
Pending Transfer Branch Menu	3

Preface

Legend

In procedures on the following pages, you will see various symbols used.

- ✓ When a procedure is described, the check mark indicates the result of an action.
- ➡ The arrow indicates a content note.

Pending Transfer

Overview

Pending Transfer allows a user to change the case status to Transfer/Active, send letters, generate narratives, and set up ticklers.

Transfer Pending may only be accessed for patients with an Active case status.
Please check the case history.
[Quit]

Important Note

The NEW county must **NOT** enter or change any data on Patient Registration Face Sheet screen until the old county closes the case.

Business Rules of the transfer process

The following business rules apply to the transfer process:

- This screen will not be utilized if the transfer has already taken place.
- Pending Transfer letters can only be generated from the Pending Transfer screen by entering the patients New address information.
- Access to the Pending Transfer screen will only be allowed if the status is “Active”.
- Changing the status from “Transfer/Active” to “Active” is utilized to start the transfer process over and clear out any existing transfer data. The process can also be used if a mistake has been made and the user would like to back out entered data.

Continued on next page

Pending Transfers, continued

Steps to Access Pending Transfer (CMSPT-10)

Complete the following steps

Step	Action
1	From the Registration menu, select Pending Transfers Press <Enter>. ✓ The Patient Identification screen displays.
2	Identify and select the patient.
	➤ If the registration status is “Closed”, “Denied”, “Pending”, “Reopen Pending” or “Not Open” the user attempts to access the Pending/Transfer screen the following pop-up message:

Pending Transfer Screen (CMSPT-10)

Use the <Down Arrow> to move from field to field. Required fields or fields that the user can change are **bolded**.

CMSNET	PENDING TRANSFER	CMSPT-10
Pt Nm: XXXXXXXXXXXX1XXXXXXXXX2XXXXXXXXX3XXXXXXXXX4 CCS#: 9999999 CIN: 99999999X 9 1) Gender: X DOB: 99/99/9999 Lgl Co: XXXXXXXXXXX1 REG=XXX MED=X F/R=XXXXXXXXXXXXX		
2) Status: XXXXXXXXXXXXXXXX 3) Notified By: XXXXXXX 4) Letter Status: XXXXXXXXXXXXXXXX		
Current Primary Addressee: New Primary Addressee:		
5) Nm: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX 13) Nm: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX 6) St1: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX 14) St1: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX 7) St2: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX 15) St2: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX 8) Cty: XXXXXXXXXXXXXXXXXXXXXXXX 9) ST: XX 16) Cty: XXXXXXXXXXXXXXXXXXXXXXXX 17) ST: XX 10) Zip: 99999 11) Ph: (999) 999-9999 18) Zip: 99999 19) Ph: (999) 999-9999 12) Current Legal Co: XXXXXXXXXXXXXXXXXXXXXXXX 20) New Legal Co: XXXXXXXXXXXXXXXXXXXXXXXX		
Pending Transfer Letter Cycle:		
Status: Ltr Name: Dt Printed: Corresp # Nxt Ltr Due:		
21) XXXXXXXXXXXXXXXX 22) XXXXXXXX 23) 99/99/9999 24) 9999-9999 25) 99/99/9999 XXXXXXXXXXXXXXXX XXXXXXXX 99/99/9999 9999-9999 99/99/9999 XXXXXXXXXXXXXXXX XXXXXXXX 99/99/9999 9999-9999 99/99/9999		
26) Comments XXXXXXXX1XXXXXXXXX2XXXXXXXXX3XXXXXXXXX4XXXXXXXXX5XXXXXXXXX6XXXXXXXXX7X XXXXXXXX1XXXXXXXXX2XXXXXXXXX3XXXXXXXXX4XXXXXXXXX5XXXXXXXXX6XXXXXXXXX7X		
27) Last Update By XXXXXXXX1XXXXXXXXX2XXXXXXXXX3 28) Date 99/99/9999		

Pending Transfers, continued**Pending Transfer
Screen Data Entry
Fields**

The following table describes fields on the Pending Transfers (CMSPT-10) screen.

FLD#	FIELD NAME	DESCRIPTION/COMMENTS
1	(Header)	Display Only
2	Status	Required The status defaults to Transfer/Active. Values: <ul style="list-style-type: none">• “Active”• “Transfer/Active” Updates the Patient Registration Face Sheet CMSFS-10, status field when record is saved. ➡When a user updates the status to “Active” and saves the record, all Transfer/Active data is cleared from the screen <i>except the current primary address information</i> . The status is changed back to Transfer/Active.
3	Notified By	Required Values: <ul style="list-style-type: none">• “Family” – C21 Letters• “Other” – C20 Letters

Continued on next page.

Pending Transfers, continued**Pending Transfer Screen Data Entry Fields (continued)**

FLD#	FIELD NAME	DESCRIPTION/COMMENTS
4	Letter Status	<p>Required</p> <p>Values:</p> <ul style="list-style-type: none"> • “1st Letter” • “2nd Letter ” • “3rd/NOA Letter <p>If “Family” is select from the Notified by field a C-21 letter series is generated.</p> <p>If “Other” is select from the Notified by field a C-20 letter series is generated.</p> <p>Upon generating a first or second letter, Nxt Ltr Due T+15 tickler (TP) is set.</p> <p>➡The " TP" tickler can be run in generate tickler/batch correspondence section to follow up on your ticklers.</p>
5	Nm	Display only The primary addressee name is populated from Patient Registration Face Sheet, CMSFS-20 screen
6	St 1	Display Only The primary addressee street 1 is populated from Patient Registration Face Sheet, CMSFS-20 screen
7	St 2	Display Only The primary addressee street 2 is populated from Patient Registration Face Sheet, CMSFS-20 screen
8	City	Display Only The primary addressee city is populated from Patient Registration Face Sheet, CMSFS-20 screen
9	St	Display Only The primary addressee state is populated from Patient Registration Face Sheet, CMSFS-20 screen
10	Zip	Display Only The primary addressee zip code is populated from Patient Registration Face Sheet, CMSFS-20 screen

Continued on next page.

Pending Transfers, continued

Pending Transfer Screen Data Entry Fields (continued)

FLD#	FIELD NAME	DESCRIPTION/COMMENTS
11	Ph	Display Only The primary addressee phone is populated from Patient Registration Face Sheet, CMSFS-20 screen
12	Current Legal Co	Display Only The current legal county is populated from Patient Registration Face Sheet, CMSFS-20 screen
13	Nm	Required Enter the name of the new Primary Addressee
14	St 1	Required Enter the street 1 st of the new Primary Addressee
15	St 2	Optional Enter the street 2 nd of the new Primary Addressee
16	Cty	Required Enter the city of the new Primary Addressee
17	ST	Required Enter the state of the new Primary Addressee
18	Zip	Required Enter the zip code of the new Primary Addressee
19	Ph	Optional Enter the phone number of the new Primary Addressee
20	New Legal Co	Required Enter the new legal county of the new Primary Addressee

Continued on next page.

Pending Transfers, continued**Pending Transfer Screen Data Entry Fields (continued)**

FLD#	FIELD NAME	DESCRIPTION/COMMENTS
21	Letter Cycle – Status	Display Only Values: <ul style="list-style-type: none"> • “1st Letter Sent” • “2nd Letter Sent” • “3rd /NOA Letter Sent” System automatically fills field after letter generation.
22	Ltr Name	Display Only System automatically fills field after letter generation in Send Correspondence.
23	Dt Printed	Display Only System automatically fills field after letter generation in Send Correspondence.
24	Corresp #	Display Only System automatically fills field after letter generation in Send Correspondence.
25	Next Ltr Due	Display Only System automatically fills field after letter generation in Send Correspondence.
26	Comment	Display Only Populates narrative upon saving. User may key up to three lines of information
27	Last Update By	Display Only Displays the name of the last user to modify data.
28	Date	Display Only Displays the date of the last change.

Pending Transfer, Continued

Action Menu The Pending Transfer screen contains five action menu choices:

Action	Description
Save	The system saves data on the screen and generates the Pending Transfer Letter. The system will also: <ol style="list-style-type: none"> 1. Populates the “Status”, “Ltr Name”, “Dt Printed”, “Corresp #” and “Nxt Ltr Due” fields 2. Sets the Pending Transfer follow up tickler (T+15 tickler) 3. Paths the user to Send Correspondence to generate the letter. 4. Then paths user to Pending Transfer Branch Menu.
Reissue Letter	The system completes the transaction as follows: <ul style="list-style-type: none"> • Cancels the last letter generated. • Generates a new letter. • Updates “Dt Printed”, “Corresp #” and “Nxt Ltr Due” the fields. • Resets the Pending Transfer Tickler Follow Up tickler is 20 days. This option appears only if a previous letter was sent.
Go Back One Letter	Cancels the current Pending Transfer letter and returns the patient record to the previous entry. This option appears only if a previous letter was sent.
Cancel	Brings up the Registration Menu. The system does NOT save changes.
Quit	Takes you back to the status field on the Pending Transfer screen.

Pending Transfer Branch Menu

When the user selects ‘Save’ from the action menu, they are branched to the Pending Transfer Branch Menu. Selections are:

(?) Narrative for Pending Transfer () Mail Message for Pending Transfer () Registration Main Menu

Continued on next page

Pending Transfer, Continued

NOTES

This page intentionally left blank for User Notes.